

MILWAUKEE COUNTY
DEPARTMENT OF HUMAN RESOURCES
PERFORMANCE APPRAISAL NOTIFICATION FORM

22eo-1 R1

Name: _____ Employee No: _____ Org. Unit: _____

Pay Range: _____ Rate Step: _____ Position: _____ Class Code: _____

Increment Effective Date: _____ Probation Limit: _____

Hours toward Probation and/or Increment: _____ as of _____

Purpose of Rating: ☐ Preliminary Probation Appraisal ☐ Final Probation Appraisal ☐ Salary Increment Appraisal ☐ Annual Appraisal ☐ Other

GUIDELINES FOR PERFORMANCE APPRAISAL NOTIFICATION FORM

1. This document should be used in conjunction with the performance appraisal form #2261 which is available from stationery stores.
2. This document must be attached to the performance appraisal form and returned to the Department of Human Resources prior to the effective date of the salary increment or conclusion of the probationary period.
3. Implementation of salary increments will not be postponed unless this document and a payroll change voucher is submitted to the Department of Human Resources indicating that the salary increment is denied.
4. This document, a payroll change voucher, and the performance evaluation form must be submitted to the Department of Human Resources indicating that the employee was terminated prior to the conclusion of the probationary period, otherwise the employee will be considered to have successfully completed their probationary period.
5. If an employee is to be re-evaluated at a future date, (minimum of 3 months) for a salary increment, a payroll change voucher must be submitted and indicate "Increment denied. To be re-evaluated effective (specific date)". (Should be first day of a pay period.) A new evaluation notification form will then be sent to the department based on the new date.
6. If an employee is to be re-evaluated at a future date, (less than 3 months) for a salary increment, a payroll change voucher must be submitted and indicate "Increment denied. To be re-evaluated effective (specific date)". (Should be first day of a pay period.) A new evaluation notification form will **not** be sent to the department. It will be the department's responsibility to return the notification form and performance evaluation form after the re-evaluation.
7. If a salary increment is approved but the implementation of the new rate is to be postponed, the payroll change voucher must indicate "Increment approved. Do not implement until (specific date)." (Should be first day of a pay period.)
8. If a salary increment is denied, departments should reference any appropriate memorandum of agreement for procedures to follow in notifying the employee.
9. The postponement of a salary increment will change the effective date of any future increments. Salary increments will be effective the first pay period following the completion of 2,080 straight time hours from the last increment.
10. If a salary increment is approved or the probationary period has been successfully completed, this form and the performance evaluation form must be submitted to the Department of Human Resources. Payroll change vouchers do **not** need to be prepared.
11. **Departments should make sufficient copies, for internal distribution, of all forms prior to submitting them to the Department of Human Resources.**

SECTION A: PERFORMANCE APPRAISAL FORM INSTRUCTIONS

To be used with form 2261.

The purpose of the Performance Appraisal Form is to establish the Standards of Measurement or Factors Considered which will be used to evaluate the employee's performance during the evaluation period. This form should be completed at the beginning of each evaluation period.

1. If the employee has been with your Department for less than one year, please contact employee's previous department for assistance in your evaluation.
2. A current position description should be reviewed by the employee and the immediate supervisor to determine the special tasks of the position.
3. The immediate supervisor should determine what are the performance factors to be considered in evaluating the tasks of the position.
4. The immediate supervisor should develop standards of measurement or factors considered in evaluating performance.
5. The performance factors and standards of measurement must be discussed with and understood by the employee. The employee must understand on what basis their performance will be evaluated.
6. Employee is to be rated based on standards of measurement. Supporting examples of actual work performance must be cited.
7. The performance improvement plan should be completed by the Department. Any items listed should reference specific factors listed in the performance evaluation. (Section B)
8. After completed form has been reviewed with the employee, the employee should sign the form (Section E) indicating that they have seen and reviewed the form. This signature does not imply agreement with the evaluation results, only that the employee has seen the completed performance appraisal form.
9. The evaluator should complete the department's comments section. (Section F)
10. The attendance record section (Section D) must be completed by the department prior to conducting the evaluation. The Department of Human Resources will not complete the attendance sections.
11. After the current evaluation is completed, any changes in standards of measurement for the subsequent year should be understood by the employee. A new evaluation form listing the standards of measures for the subsequent year must be prepared by the department and reviewed with the employee. It is suggested that the employee initial the new form and be given a copy.

SECTION B: Listed in this section are a number of factors which are important for successful performance in many jobs. Carefully study each factor and the descriptions of each and make an objective evaluation.

JUDGEMENT _____ Not Considered During This Rating Period

Elements: Demonstrated skills in establishing proper priorities and knows how to find answers and considers all viable alternatives.
Remains calm and act decisively and rationally while under constraints or adverse conditions.
Distinguishes between situations that can be completed and those that should be referred.
Able to make routine decisions.
Appraises a situation before acting and identifies problem areas that need attention.

Standards of Measurement or Factors Considered:

1)

2)

3)

4)

Overall Rating: _____ Meets established standards of performance _____ Exceeds established standards of performance
(Check One) _____ Partially meets established standards of performance _____ Inadequate performance based on established standards of performance

Supporting Examples:

INITIATIVE _____ Not Considered During This Rating Period

Elements: Presents ideas, improves procedures or otherwise demonstrates an awareness related to the job.
Sets and meets challenging goals.
Works independently on routine matters and seeks out additional work when own is completed.

Standards of Measurement or Factors Considered:

1)

2)

3)

4)

Overall Rating: _____ Meets established standards of performance _____ Exceeds established standards of performance
(Check One) _____ Partially meets established standards of performance _____ Inadequate performance based on established standards of performance

Supporting Examples:

QUANTITY OF WORK ___ Not Considered During This Rating Period

Elements: Amount of work performed or output.
Completion of work on schedule as compared with the performance standards of the position.
The quantity of work is satisfactorily performed in relation to the expected volume of work taking into account work interruptions and changes in priorities.

Standards of Measurement or Factors Considered:

1)

2)

3)

4)

Overall Rating: ___ Meets established standards of performance ___ Exceeds established standards of performance
(Check One) ___ Partially meets established standards of performance ___ Inadequate performance based on established standards of performance

Supporting Examples:**COMMUNICATIONS SKILLS** ___ Not Considered During This Rating Period

Elements: Ability to listen and absorb forms of information.
Uses good writing principles such as clarity, brevity and appropriate detail when completing documents.
Speaks in a concise, clear manner and presents organized ideas to assure understanding.
Non-verbal behavior is appropriate to situation.
Writes in an acceptable grammatical form and uses the appropriate formats.

Standards of Measurement or Factors Considered:

1)

2)

3)

4)

Overall Rating: ___ Meets established standards of performance ___ Exceeds established standards of performance
(Check One) ___ Partially meets established standards of performance ___ Inadequate performance based on established standards of performance

Supporting Examples:

DEPENDABILITY ☐ Not Considered During This Rating Period

Elements: Can be relied upon to work and to meet established deadline without close supervision.
 Amount of supervision required as compared with the basic requirement of the position.
 Assumes responsibility, works independently and finds ways to improve workflow.
 Reliability in following instructions and observance of work rules.

Standards of Measurement or Factors Considered:

1)

2)

3)

4)

Overall Rating: ☐ Meets established standards of performance ☐ Exceeds established standards of performance
(Check One) ☐ Partially meets established standards of performance ☐ Inadequate performance based on established standards of performance

Supporting Examples:**QUALITY OF WORK** ☐ Not Considered During This Rating Period

Elements: Accuracy with which tasks are performed.
 Few revisions or corrections are required on job assignments.
 Submits completed work that has been worked through to a logical conclusion with all avenues covered and requires no further work to complete it.
 Consider accuracy, thoroughness, neatness and the amount of checking or verification that must be done on employee=s work in meeting the established departmental standards and/or anticipated results of this position.

Standards of Measurement or Factors Considered:

1)

2)

3)

4)

Overall Rating: ☐ Meets established standards of performance ☐ Exceeds established standards of performance
(Check One) ☐ Partially meets established standards of performance ☐ Inadequate performance based on established standards of performance

Supporting Examples:

SECTION C: PERFORMANCE IMPROVEMENT PLAN

Please answer the following statements as specifically as possible and reference the specific factor from Section B.

1. This employee should concentrate on the following performance elements to improve present performance (set objectives, standards and timetables):
2. Please list the actions the department will be taking to provide assistance to the employee to improve performance and development:
3. This employee should consider the following course(s) of action for long-term development:

	Jan.	Feb.	March	Apr.	May	June	July	Aug	Sept.	Oct.	Nov.	Dec.
Monthly total of sick leave incidents/Hours												
Number of unexcused absences/Times Tardy												

SECTION E: EMPLOYEE COMMENTS

I have reviewed a copy of the appraisal form and it has been discussed with me.

Employee's Signature _____ Date _____

SECTION F: DEPARTMENT REPORT/COMMENT

Have the position description and the standards of performance been reviewed, and if necessary, updated by the supervisor and the employee? ___ Yes ___ No

If no please explain:

Please forward updated position description to Department of Human Resources.

Comments:

Annual Review Only _____

This report is based on my best judgement of this employee's job performance.

Probation ___ **Pass** ___ **Fail** ___ **Termination** ___
Date _____

Salary Increment ___ **Approved** ___ **Disapproved** ___

Evaluator's Signature _____ Date _____

I have reviewed this report.

Department Head _____ Date _____